

HVAC Change-Out Checklist

Pre-Installation

- Review the Job Order: Confirm the type of system to be installed, the model, and any special instructions.
- Safety Check: Ensure all necessary personal protective equipment (PPE) is on hand and in good condition.
- Inspect Existing Equipment: Document the condition and any pre-existing issues with the current HVAC system.
- Measurements and Assessments: Confirm the new unit's size and specifications match the existing space and ductwork.
- Permit and Documentation: Ensure all required permits are obtained and regulations are understood.

Preparation

- Turn Off Power: Ensure the electrical supply to the current HVAC system is turned off at the breaker.
- Secure the Work Area: Lay down protective coverings to prevent damage to the homeowner's property.
- Tools and Equipment: Verify that all necessary tools and equipment for the job are on-site and in working order.
- Materials Check: Ensure all materials, including the new HVAC unit, ductwork pieces, fittings, and fasteners, are available and correct.

Removal of the Old Unit

- Refrigerant Recovery: Safely recover and dispose of the refrigerant from the old unit according to EPA regulations.
- Disconnect Old Unit: Carefully disconnect all electrical connections, ductwork, and refrigerant lines.
- Remove Old Unit: Safely remove the unit from its position, ensuring to follow proper lifting techniques.

Installation of the New Unit

- Placement of New Unit: Install the new unit in its designated location, ensuring it is level and secure.
- Ductwork Connection: Connect and seal the ductwork to the new unit, ensuring no leaks.

- Electrical and Refrigerant Line Connections: Properly connect the electrical wiring and refrigerant lines, following manufacturer instructions.
- Install Thermostat: If a new thermostat is part of the installation, wire and position it according to the manual.
- Condensate Drain: Ensure the condensate drain is correctly installed and routed to an appropriate location.

Post-Installation

- Charge with Refrigerant: Charge the new unit with refrigerant, adhering to the manufacturer's specifications.
- Test the System: Turn on the power and run the system through a complete cycle, checking for proper operation in heating, cooling, and fan-only modes.
- Leak and Safety Checks: Use a leak detector to check for refrigerant leaks and ensure all electrical connections are secure.
- Airflow Measurement: Verify that airflow through the system and individual vents is within specifications.
- Final Inspection: Conduct a thorough final inspection of the installation for any issues or omissions.
- Clean-Up: Remove all tools, equipment, and debris from the work area. Ensure the site is clean and presentable.

Documentation and Customer Satisfaction

- System Documentation: Provide the homeowner with all warranties, manuals, and documentation related to the new system.
- Demonstrate Operation: Show the homeowner how to operate the new system and thermostat.
- Feedback: Ask for feedback on the installation process and address any concerns.

Completion

- Sign-Off: Have the homeowner sign off on the job, confirming their satisfaction with the installation.
- Report Completion: Report back to the office or supervisor that the job has been completed, noting any issues encountered or additional follow-ups required.